

# Hancock Cloud Training Guide

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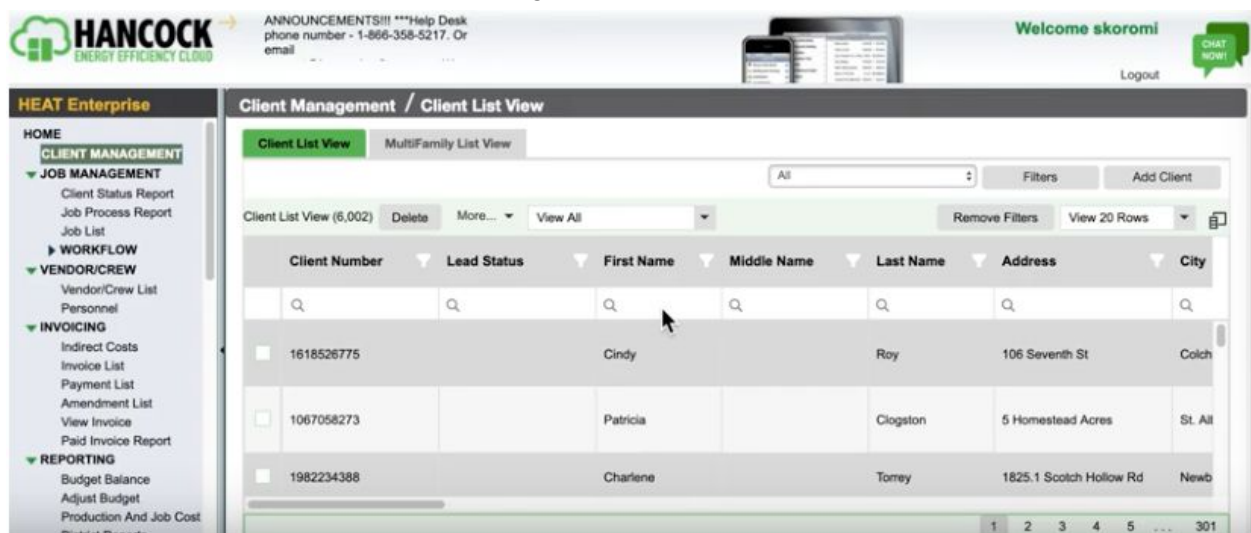
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## Client Management Screen

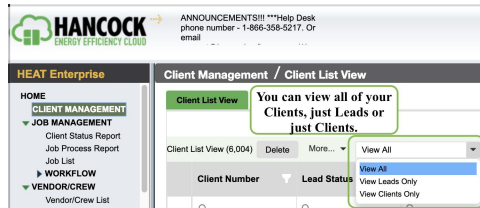
From the main menu, select Client Management.



The Client Management Screen is where you will open Client Records, delete Clients, export lists, import Client Job information, convert Leads to Clients and add new Clients.

You can create custom views for your login using the “Filters” button, the Column Chooser or by selecting Funnel icon next to each Column Header. Please remember, each time you log in, the system will apply the last Filter used. If you think you’re missing Jobs or Clients, simply click “Remove Filters” to start fresh.

The Client List View count on the top left will update as you apply Filters. Next to the “More” button on the top left, you can select preset views.



To open a Client, simply double click the record. To delete a Client, check the box next to the desired record and click “Delete” on the top left-hand side of the screen.

You can shift columns by dragging the column name to the left or right as desired.

By clicking “More” you can choose/perform the following:

- Export your current List View of Clients/Leads.
- Import Client Job Information.
- Mark a Lead as “Invalid” by checking the box next to the record and selecting “Invalid.”
- Convert to Client by checking the box next to the record and selecting “Convert To Client.”

To create a new Client, click on the “Add Client” button next to the Filters.

To view specific criteria in a Column, simply click on the Funnel icon next to the Column name and select your filters. Select OK at the bottom of the options.

To choose what Columns you’d like to view, click on the Column Choose icon on the far right-hand side of the screen and the Columns choices will pop up. Select which Columns you want to view by checking the box next to the name.

**HANCOCK ENERGY EFFICIENCY CLOUD**

ANNOUNCEMENTS!!! \*\*\*Help Desk phone number - 1-866-358-5217. Or email

**HEAT Enterprise**

**Client Management / Client List View**

**Client List View**

Number of Clients in your View List: 6,004

Client List View (6,004) Delete

More... View All

Export List

Import Client Job Info

Change the Status Invalid

Convert To Client

By clicking "More" you can choose the following:  
 -Export your current List View of Clients/Leads.  
 -Import Client Job Information.  
 -Mark a Lead as "Invalid" by checking the box next to the record and selecting "Invalid."  
 -Convert to Client by checking the box next to the record and selecting "Convert To Client."

To edit/create/delete Filters, click here.

To clear ALL Filters, click here.

Click here to add new Clients.

Set Filters here.

Remove Filters

View 20 Rows

Click here to select what Columns you'd like to view.

Column Chooser

Client Number

Lead Status

First Name

Middle Name

Last Name

Check the boxes of the Columns you'd like to view.

Client Number	Name	Middle Name	Last Name	Address	City
1560036799			Frechette	210 Hilder	
1648485600	Jon		Hughes	1896 Beaver	
748512487	Eugene	Bin		Park St	
112261904	Louise	Mur		7 Store I	

1 2 3 4 5 ... 301

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Hancock Software © 2018 (v1.0.1(G000009))

To use a specific Filter, choose from the dropdown on the top right next to the "Filters" button.

To add, edit or delete Filters, click on the "Filters" button on the top right of the screen.

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**HEAT Enterprise**

**Client Management / Client List View**

**Client List View**

Click here to add/edit/delete Filters

Choose a specific Filter here.

All

Filters

Add Client

Client List View (6,004) Delete More... View All

Click here to reset all Filters.

Remove Filters

View 20 Rows

Client Number	Lead Status	First Name	Middle Name	Last Name	Address	City

To create a new Filter, click on the "Filter" button and a new window will pop up. Click "Add."

**Filters**

Leveraged

DOE

test filter 2

Click and highlight a Filter to Edit or Delete it.  
Click "Add" to create a new Filter.

Edit Delete Add Cancel

1. Type a name for your Filter.
2. Click the plus sign to create a new group or condition.
3. Click on each section to choose from the drop-down or fill in the value.
4. Save.
5. Click Apply if you want to instantly apply the filter.

**Add Filter**

And +

Job Number Contains <enter a value>

1. Type a name for your Filter.  
2. Click the plus sign to create a new group or condition.  
3. Click on each section to choose from the drop-down or fill in the value.  
4. Save.  
5. Click Apply if you want to instantly apply the filter.

Test Filter 2

Save Delete Cancel Apply

## Job Management / Job List Training

On the main menu, expand job management and select Job List.

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Welcome HSSupport

Logout

**HEAT Enterprise**

HOME

CALL CENTER

Call Center Add

Call Center List

Call Center Import

LEAD MANAGEMENT

CLIENT MANAGEMENT

JOB MANAGEMENT

Client Status Report

Job Process Report

Job List

WORKFLOW

Job Assignment

VENDOR/CREW

Vendor/Crew List

Vendor User

Personnel

Vendor Wages List

Agency Wages List

State Wages List

INVOICING

Indirect Costs

Invoice List

**Job Management / Job List View**

Job List View

Job List View (9,038) Delete More... Remove Filters View All Rows

Job Number	Multi-Family List	Job Status	First Name	Last Name	Street
3887C	No	Completed	Francis	Kelly	279 Plateau Acres
3964C	No	Completed	Shirley	Robinson	35 Blake Hill Road
3893C	No	Completed	Bonnie	Willis	1415 Dearing Road
3980WX	No	Completed	Amy	Decarmine	2738 Flint Road

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The Job List Screen is found under the Job Management Screen. From this screen, you can view all the Jobs for your State/Agency, delete Jobs and also export your current Job List View.

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ANNOUNCEMENTS!!! \*\*\*Help Desk phone number - 1-866-358-5217. Or email

Welcome skoromi

Logout

CHAT NOW!

**HEAT Enterprise**

**Job Management / Job List View**

Job List View (9,038)

Delete More... Export List

Export to Excel Export to PDF Export to CSV

To add and edit Filters, click here. Filters

To remove all Filters, click here. Remove Filters View 20 Rows

To delete a job, check the box and click "Delete."

To Export the current Job List View, click "More," Export List and choose your format.

Click the funnel to filter that specific column

Click the Column Chooser button to view specific columns.

Job Number	Job Name	Last Name	Job Status	Street
<input checked="" type="checkbox"/> 3887C	zzCVPS, EVT Leveraged	Francis	Kelly	Completed
<input type="checkbox"/> 3964C	zzCVPS, EVT Leveraged	Shirley	Robinson	Completed
<input type="checkbox"/> 3893C	zzCVPS, EVT Leveraged	Bonnie	Willis	Completed

Column Chooser

Search

☒ Job Number  
☐ Multi-Family List  
☒ Job Status  
☒ First Name  
☒ Last Name

1 2 3 4 5 ... 452

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You can create custom views for your login using the "Filters" button, the Column Chooser or by selecting Funnel icon next to each Column Header.

**\*\*Please remember, each time you log in, the system will apply the last Filter used. If you think you're missing Jobs or Clients, simply click "Remove Filters" to start fresh.**

The Job List View count on the top left will update as you apply Filters.

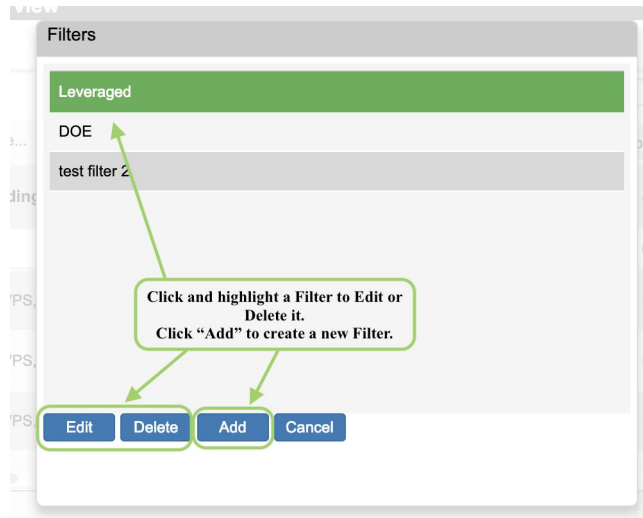
To open a Job, simply double click the record. To delete a Job, check the box next to the desired record and click "Delete" on the top left-hand side of the screen.

You can shift columns by dragging the column name to the left or right as desired.

To export your current Job List View, click on the "More" button. From that dropdown, select "Export List" and choose which way you'd like to export.

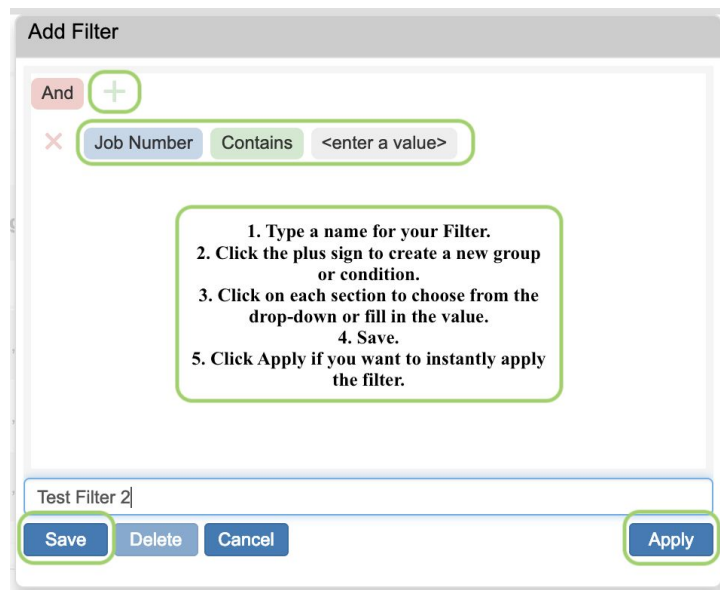
## Add/Edit Filters

To add, edit or delete Filters, click on the "Filters" button on the top right of your screen.



To create a new Filter, click “Add.”

1. Type a name for your Filter.
2. Click the plus sign to create a new group or condition.
3. Click on each section to choose from the drop-down or fill in the value.
4. Save.
5. Click Apply if you want to instantly apply the filter.



## Hancock Cloud New Intake Screens

Enter the client's application in new expandable and collapse client intake screens. View the on-demand training here [https://youtu.be/i3Bry-sh\\_IQ](https://youtu.be/i3Bry-sh_IQ)

WAP

+ Contact

+ Application

+ Energy Consumption

- Family

	First Name	Middle Name	Last Name	Date of Birth	Age	Race	Relation	Marital Status
<input type="checkbox"/>	Patricia		Clogston	1/20/1978	40		HH	

+ Income

+ Demographics

+ Document

Hancock's new and improved Client Intake features, which are part of the Hancock Cloud upgrade.

- New client intake screens make it easier to enter information
- New history section shows what type of weatherization the client has received to date
- New snapshot tabs save a history of previous year's intake forms

### From the Client Management screen:

If you think the client may have applied to weatherization before, you can search the client management screen for an existing record and double click to open it.

When a new client who has never received weatherization before applies to your program, select 'Add Client'. After entering your information you will be taken to the Application section.

HEAT Enterprise

Client Management / Client List View

Client List View MultiFamily List View

All Filters Add Client Check History

Client List View (159,932) Delete More... View All Remove Filters View 20 Rows

Client Number	Lead Status	First Name	Middle Name	Last Name	Address	City	County
---------------	-------------	------------	-------------	-----------	---------	------	--------

Add Client
Save
New Application
Cancel
Help

Client Information

\*Note: Information in this section is used for preliminary eligibility checks only where Monthly Income and Occupants are required. Pre-check will help identify the programs that the client may be eligible for and determines the detailed information that needs to be gathered to determine final eligibility.\*

Pre-Check Eligibility

Pre-Approval Reason

First Name\*

Middle Name

Last Name\*

Test

Hancock

Street\*

Apartment

123 Hancock St

Street 2

City\*

State\*

Zip\*

Abbotstown

PA

00000

Phone

Monthly Income

Occupants

500

4

**Client Information:** This is the client's application. To maximize the sections you will select the +, this will expand only that area. To minimize select the -, and once again your section will hide. The arrows in front of the title of each section let you expand your window take up your entire computer screen.

Edit Client - Test Hancock
Open Job
Save
New Application
Cancel
Help

Client Information

WAP

+ Contact

+ Application

+ Energy Consumption

- Family

Add New

Delete

	First Name	Middle Name	Last Name	Date of Birth	Age	Race	Relation	Marital Status
<input type="checkbox"/>	Test		Hancock				HH	

+ Income

+ Demographics

+ Document

+ History







**The Contact and Application sections:** This is basic information about the client's application. Their address, Agency, dates, building type, and heating.



— Contact

<p><b>First Name*</b></p> <input type="text" value="Test"/> <p><b>Phone</b></p> <input type="text"/> <p><b>Street*</b></p> <input type="text" value="123 Hancock St"/> <p><b>Street 2</b></p> <input type="text"/> <p><b>City*</b></p> <input type="text" value="Abbotstown"/> <p><b>Mailing Address</b></p> <input type="text"/> <p><b>Landlord Name</b></p> <input type="text"/> <p><b>Landlord Address</b></p> <input type="text"/> <p><b>Landlord City</b></p> <input type="text"/> <p><input type="checkbox"/> Owner Is Income Eligible</p>	<p><b>Middle Name</b></p> <input type="text"/> <p><b>Alternate Phone</b></p> <input type="text"/> <p><b>Apartment</b></p> <input type="text"/> <p><b>County*</b></p> <input type="text"/> <p><b>State*</b></p> <input type="text" value="PA"/> <p><b>City State Zip</b></p> <input type="text"/> <p><b>Landlord Phone</b></p> <input type="text"/> <p><b>Landlord State</b></p> <input type="text"/>	<p><b>Last Name*</b></p> <input type="text" value="Hancock"/> <p><b>Email</b></p> <input type="text"/> <p><b>Zip*</b></p> <input type="text" value="00000"/> <p><input type="checkbox"/> Same as Service Address</p> <p><b>Landlord ZIP</b></p> <input type="text"/>
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## — Application

Agency* Department of Community & Economic De ▼		
Pre-select Funding ▼	Allocation WAP	Last Benefit Received 
Client Number 994709705	Intake By Hancock Support	Import ID ▼
Applied Date 3/5/2019 	Certified Date 	
Expiration Date 3/5/2020 	Transfer Date 	
Categorical Eligibility ▼	Client Status Incomplete App	Wap Rank 0
<input type="checkbox"/> Inactive	Inactive Reason ▼	
<input type="checkbox"/> Reweatherization	Reweather. Date 	
Building Type* ▼	Primary Heating* ▼	Secondary Heating Source ▼
Congressional ▼	Legislative ▼	State Senatorial ▼

On the Energy Consumption, Family and Income sections, you will be able to select 'Add New' to enter a new record. By selecting 'Add New' the area will expand providing you the appropriate fields for each section.

Energy Consumption

Add New

Delete

	Utility	Date	Fuel Type	Usage Mode	Annual Energy Usage	Account Number
There are no records available.						

Family

Add New

Delete

	First Name	Middle Name	Last Name	Date of Birth	Age	Race	Relation	Marital Status
	Test		Hancock				HH	

Income

Add New

Delete

	Family Member	Income Type	Pay Amount (\$)	Frequency	Monthly Income	Hours/V
There are no records available.						

Employment Verification

	Family Member	Status Date	Name	Street	City	Contact	State	Zip
--	---------------	-------------	------	--------	------	---------	-------	-----

**The Energy Consumption section:** If a household uses more than one type of fuel, add a second record.

Energy Consumption

Second Record:

Add New

Delete

	Utility	Date	Fuel Type	Usage Mode	Annual Energy Usage	Account Number
Utility: *	<div></div>	Date:	3/6/2019			
Fuel Type:	<div></div>	Fuel Switch:	<div></div>			
Usage Mode:	Annual Energy Usage	Annual Energy Usage:	<div></div>			
Monthly Cost:	<div></div>	Utility Allowance:	0.00			
Name on Account:	<div></div>	Same Name:	<div></div>			
Account Number: *	<div></div>	No Account Number:	<div></div>			
Heating:	<div></div>	Heating Usage:	<div></div>	DHW:	<div></div>	DHW Usage:
Cooling:	<div></div>	Cooling Usage:	<div></div>	Baseload:	<div></div>	Baseload Usage:
<div>Save</div> <div>Cancel</div>						
First Record:						
	Coal Utility	3/6/2019	TON BITUMINOUS	Annual Energy Usage	0.00	No Account Number



WAP

Client History for 994709705 (DCED)

- + Contact
- + Application
- + Energy Consumption
- + Family
- + Income
- + Demographics
- + Document
- + History

When you select 'New Application', the system will make a copy of the original application and highlight everything in yellow that needs to be reviewed or update. To review the application tab through and review the fields for accuracy.

WAP

Client Information - DCED Client History for 994709705 (DCED)

- + Contact
- + Application
- Energy Consumption
 

Utility	Date	Fuel Type	Usage Mode	Annual Energy Usage	Account Number
Coal Utility	3/6/2019	TON BITUMINOUS	Annual Energy Usage	0.00	No Account Number
- + Family
- + Income
- + Demographics
- + Document
- + History

The History section will now show that the client has been duplicated.

— History

Description	Client Number	Agency	Action taken by	Date of Action	Notes
Application received	994709705	Department of Community & Economic Development	By: Hancock Support	3/5/2019	
Client assigned to Job 994709705	994709705	Department of Community & Economic Development	By: Hancock Support	3/6/2019	
Client is duplicated	994709705	Department of Community & Economic Development	By: Hancock Support	3/6/2019	
Program	Funding Source/Allocation	Job/Account Number	Complete Date	Benefit Received	
WAP		994709705		0.00	
Total Amount :					